Using Invoca Call Tracking & Analytics to Increase Appointments Set and Create Marketing Efficiencies

Results at a Glance

- **580%**: increase in appointments scheduled
- **300%**: increase in conversion rate
- **50%**: reduction in total call duration
- **40**: employee-hours saved per week

University Hospitals first tapped Invoca to increase appointment scheduling rates and get more insight into marketing spend effectiveness. Now, it is using conversation intelligence everywhere it can.
University Hospitals, founded in 1866 and based in Cleveland, Ohio, is one of the leading healthcare providers in the United States. It has more than 200 locations, with 18 different hospitals, 55 health centers and about 30,000 employees. University Hospitals receives more than 400,000 calls per month—and making sure patients can connect with the right doctors and facilities is an ongoing imperative for the nonprofit organization.

One of University Hospital’s current goals is to create a more seamless journey for patients, from the moment they start researching symptoms or doctors through billing and follow-up care. A critical part of the patient journey is, of course, scheduling appointments. So, too, is the overall experience that patients have with the University Hospital brand, including through its marketing efforts.

“In healthcare, a phone call, including one driven by a marketing campaign, isn’t just a phone call,” said Noah Brooks, Manager of Digital Engagement and Analytics at University Hospital. “We have a responsibility to make sure that when patients call, they get the information and care they need, right when they need it. That responsibility includes using better technology to create a better patient experience, which is why we implemented Invoca.”
University Hospitals had faced significant limitations with its previous call tracking solution. “We didn’t have much insight,” said Brooks. “It was really difficult to tie a specific appointment or a patient to marketing spend or to different efforts that we had in the market. It was a manual and after-the-fact process, which meant we couldn’t make changes on the fly to turn off what isn’t working and amplify what is. And it was basically impossible to track phone calls and determine which ones had turned into appointments.”

Twelve of the full-time employees in University Hospitals’ marketing group were each devoting several hours per week to listening to phone calls, manually marking calls that turned into appointments, and documenting what transpired during each call. “This process wasn’t efficient or accurate,” said Brooks. “It was also costly.”

Also, University Hospitals had to use conversion proxies like call duration to correlate to marketing performance, said Brooks. “We had basically said that any call over two minutes counts as a conversion,” he explained.

With healthcare experience expectations at an all-time high, University Hospitals needed to create seamless digital-to-call experiences to increase appointment conversions. This became even more important as COVID-19 took hold in the US.

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Brooks had recommended Invoca to University Hospitals based on his previous experience using the solution. However, while his team was quick to understand the value of the platform, the contact center team was initially hesitant to implement it. But that changed once they learned what insights they’d get from Invoca.

“We told them that we’d be able to give them recordings and data that would help highlight the issues they’d been struggling with, such as being understaffed or not having the correct tools to send callers to the right place,” said Brooks, adding that the fact Invoca is HIPAA-compliant made everyone feel comfortable about transitioning to the platform.

The ability to tie scheduled appointments to marketing performance in real time with Invoca and Signal AI has “changed the direction of marketing” for University Hospitals, according to Brooks. “Rather than saying, ‘This ad drove 10,000 clicks,’ we can now say, ‘This ad drove 500 appointments, and those appointments went to these specific doctors or locations,” he said.

Invoca helped Brooks and his team discover something else — that the two-minute metric they’d been using to count conversions was meaningless. “After we implemented Invoca and started recording and analyzing calls, we realized a two-minute call is not a conversion,” he said. “In fact, it was highly unlikely that someone would even answer the phone in two minutes.”

**Greater ability to ensure a consistent call experience**

University Hospitals’ contact center team now uses Invoca to track performance and monitor call quality. They also measure whether their staff stays on script during calls with patients. That was a problem before Invoca, according to Brooks, as many patients weren’t being scheduled for follow-up appointments.

“Now, with Invoca, our contact center team has the tools they need to communicate well with patients,” said Brooks.
Less call drop-off and more appointments scheduled

After implementing Invoca and Signal AI, University Hospitals discovered that 29% of patient phone calls were being routed to a physician messaging service. That service would pass along the patient data to a doctor’s office, which would need to call the patient back. Of the 5,800 calls a month going to that service, only 10% were resulting in appointments,” said Brooks.

University Hospitals made some changes internally to reduce the drop-off, including training the partner that provides the messaging service to use its scheduling system for appointments. Now, 68% of the callers are getting appointments scheduled. “That’s had a huge impact,” said Brooks. “Invoca gave us insights into an issue that we didn’t even know about.”

For example, a patient may make it all the way through the scheduling process and then be turned off by how far out the appointment is. “So, that means we have an operational access issue to resolve — how can we get patients in to see doctors faster?”

Less manual work and more value-adding initiatives

Now that University Hospitals is using Signal AI to classify calls, its 12-person team that used to handle the process manually can focus more time on other value-adding initiatives. “We’ve been able to save 40 hours a week in total for all of those employees,” said Brooks. “They’re now focusing on optimizing their marketing campaigns, developing new creative, and testing new things.”

“Invoca has really changed our marketing group, he added. “Instead of being order-takers, we can now develop our strategy and proactively look forward.”

“Implementing Invoca at University Hospitals was one of the biggest wins of our department and it gave us the data needed to significantly improve performance,” said Matthew Eaves, vice president of digital marketing at University Hospitals.
Using Invoca’s Salesforce Marketing Cloud integration to personalize call experiences

University Hospitals uses a central contact center to answer calls. Since patient data is distributed across their 200 locations, the contact center isn’t able to schedule appointments for every location. Instead, they often rerouted the caller from the contact center to their desired specialist’s office. This created more transfers, longer hold times, and an unsatisfactory experience for callers.

Invoca enabled University Hospitals to fix this issue and create a more cohesive call experience. Within their CRM, University Hospitals knows which providers its patients have seen in the past and which locations they’ve visited. Using Invoca’s connector for Salesforce Marketing Cloud, it can swap out the generic contact center phone number from each email campaign with the phone number for the provider the patient most recently visited. So, rather than going to a contact center handling hundreds of thousands of calls, the patient is immediately directed to their preferred provider. This has allowed patients to schedule appointments more quickly, cutting their total call duration by 50%. And conversion rates are up 300% on calls thanks to Invoca’s Salesforce Marketing Cloud integration.

“We can use the Invoca connector for Salesforce Marketing Cloud and include the number in the email that links directly to the healthcare provider. Just being able to personalize this experience has given us a big improvement in the experience for those patients,” said Brooks.

Using conversation intelligence to pivot during the pandemic

During the height of COVID-19 in the U.S. University Hospitals used Invoca to get insights from patient conversations with contact center agents. As a result, they could see what was concerning patients at the moment and act proactively to meet their needs. This ensured patient satisfaction across their 200-plus locations and helped them stay ahead of any potential bad reviews or negative press.

One of the issues University Hospitals uncovered with Invoca was that some agents weren’t following the scripts they had in place to ensure a consistent message around COVID-19. This was detrimental to the patient experience — and, in some cases, it was negatively impacting appointment conversion rates. The problem was exacerbated by contact center agents beginning to work remotely, without supervision from managers. Now that University Hospitals has visibility into its phone conversations with Invoca, it can detect problems like this and prevent them from happening in the future.

“Invoca has helped us get back on track so that we can continue to serve a consistent message, maintain our conversion rates from calls to appointments, and provide the best possible patient experience,” said Noah Brooks.
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Learn more about how leading marketers are using call intelligence to drive revenue at invoca.com/customers.